

Often confusing and even intimidating, strategic planning is nothing more than setting an organization's long-term goals and the plan to achieve them. It clarifies purpose and direction, focuses the organization's activities and resources, and helps ensure sustainability.

A basic strategic plan is:

- a governance activity entrusted to nonprofit boards
- a set of goals and tactics designed to help an organization perform its mission and ultimately achieve its vision
- a guide to balancing often conflicting priorities and allocating resources

High-level process for developing your strategic plan

1. Start with a SWOT (Strengths, Weaknesses, Opportunities & Threats) or similar analysis
2. Draft a plan
3. Discuss, test, modify and then accept goals
4. Develop action plans for implementation

Strategic planning often gets a bad name because organization's fail to implement the plan. Recent studies show that only 12% of strategic plans are fully implemented. So, it's vitally important to allocate leadership's time to implementing and managing the plan after it's approved. Here's a suggested model:

- Leadership team takes a day away every 90 days to an off-site location to avoid interruptions and temptations to go back to your desk
- Cell phones off and no emails – be fully present at the meeting
- Review past 90 days and set course for next 90 days
- Ensure the organization is furthering the goals of the strategic plan

The overall goals of strategic planning are to keep the organization focused and efficient and to ensure long-term sustainability. What does a "sustainable organization" look like?

- A single, clean, up-to-date **database** – the life blood of the organization. There are up-to-date policies governing its use and procedures that ensure the data stays up-to-date.
- **Fund development plan** that reasonably projects revenue needs and strategies for meeting those needs for the next three years.
- Clear **program policies and procedures** as well as the supervision to ensure they are followed.
- Regular **measures, assessments, and evaluation** of program and administrative effectiveness.
- **Communication plan** that uses all available media to best reach their target audience(s) with appropriate frequency.
- **Succession planning** for key roles in the organization (staff & board) – both short-term for sudden absences and long-term for planned absences.

Primary Source: Nonprofit World, Sep/Oct 2012, by Lisa Dahmus & Lynn Perry Wooten